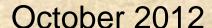
City of Austin 2012 Community Survey Findings

Presented by

ETC Institute





Agenda

- Purpose and Methodology
- Bottom Line Upfront
- Major Findings
- Conclusions
- Questions

Purpose

- To objectively assess resident satisfaction with the delivery of City services
- To measure trends from 2009 to 2012
- To gather input from residents to help set budget priorities
- To compare Austin's performance with other large cities

Methodology

Survey Description

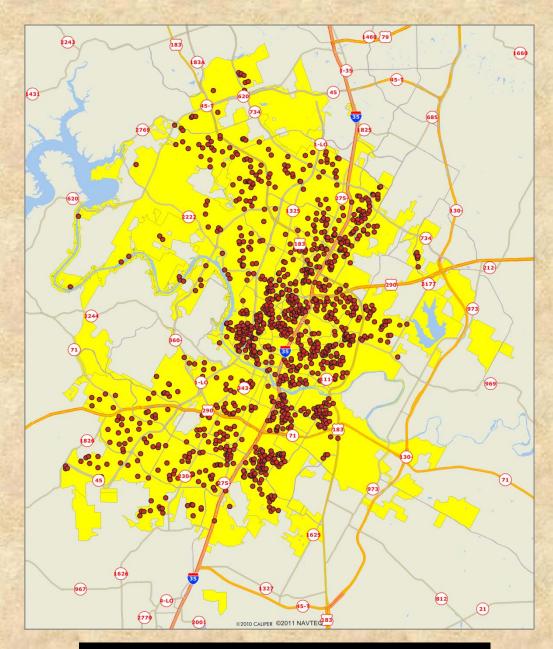
 included most of the questions that were asked in 2009, 2010 and 2011

Method of Administration

- by mail and phone to a randomly selected sample of households (in both English and Spanish)
- sample was stratified to ensure the completion of at least
 200 surveys in each of 6 areas
- Sample included households with traditional land lines and cell phones
- each survey took approximately 15 minutes to complete
- Sample size: 1,264 completed surveys
- 95% Confidence level; Precision of +/- 2.7%
- Sample was representative of the City's population

City of Austin 2012 Community Survey

Location of Respondents



Good Representation By LOCATION 5

Bottom Line Up Front

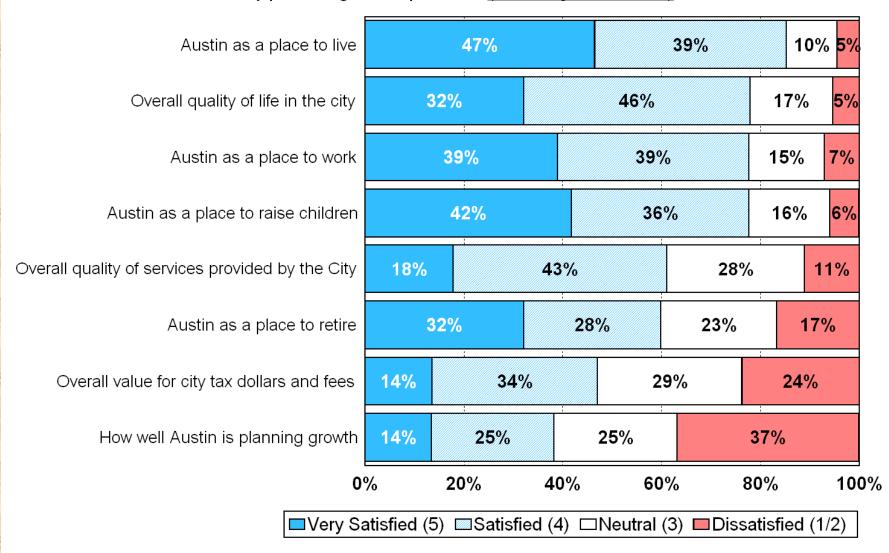
- Residents Generally Have a Positive Perception of the City
- The City of Austin Continues to Set the Standard for Other Large Cities
- Improvements to City <u>Streets/Sidewalks</u>, <u>Public Safety</u> and <u>Drinking Water Services</u> will have the most positive impact on overall satisfaction over the next year.

Major Findings: #1

Residents Generally Have a Positive Perception of the City

Q1. Perception Residents Have of the City

by percentage of respondents (excluding don't knows)



Q2. Overall Satisfaction With Various Aspects of City Services by Major Category

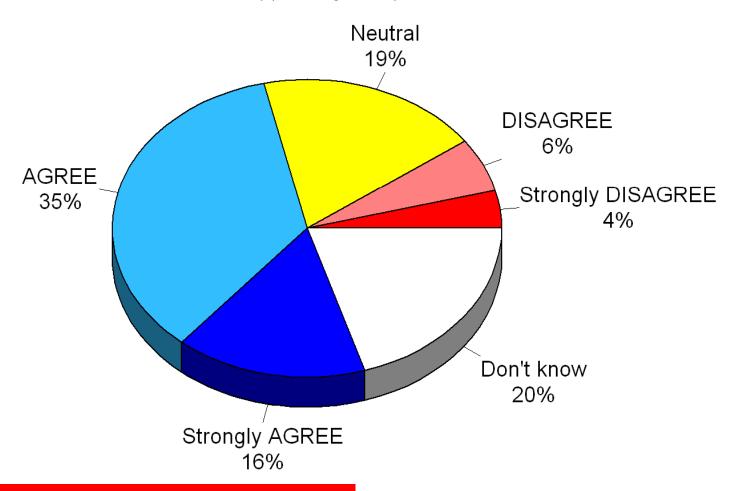
by percentage of respondents (excluding don't knows)

Austin-Bergstrom International Airport	37%			45%			15% <mark>4%</mark>	
Quality of public safety services	29%		47%			17% 7%		
Quality of drinking water services	30%		43%			16%	6 11%	
Quality of City libraries	28%		44%			20%	8%	
Quality of parks and rec programs/facilities	28%			44%			10%	
Quality of wastewater services	26%	%	45			20%	10%	
Quality of electric utility services	24%	6	40%			21%	15%	
Animal Services	20%		44%		25%		11%	
Overall management of stormwater runoff	16%		42%		31%		12%	
Overall quality of health and human services provided by City	16%		41%		30%		13%	
Quality of municipal court services	17%		40%		31%		12%	
Austin's overall effectiveness of communication	15%		35%		34%		17%	
Overall maintenance of City streets and sidewalks	11%	31	31% 28		3% 3		0%	
Overall quality of planning, development review, permitting and inspection services	10%	27%	27%		32%		1%	
	%	20%	40%	6	60%	80%	100%	
■Very Satisfied (5) ■Satisfied (4) ■Neutral (3) ■Dissatisfied (1/2)								

With the Exception of Planning/Development Review/Permitting/Inspection Services and Street/Sidewalk Maintenance, fewer than 18% of the Residents Surveyed Were Dissatisfied With Any of the Overall City Services Assessed

Q18. Level of Agreement with the statement: "Employees of the City of Austin are ethical in the way they conduct City business"

by percentage of respondents



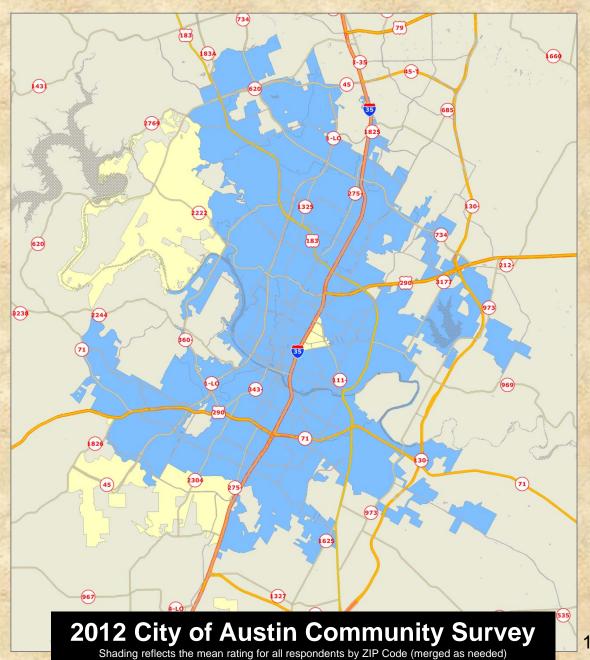
Major Findings: #2

Overall Satisfaction with City Services Is Generally the Same Throughout the City

Satisfaction with the **OVERALL** quality of services provided by the City

While There Are
Some Differences for
Specific Services,
Overall Satisfaction
With City Services
Is the Same in Most
Parts of the City





Major Finding #3

Satisfaction Levels in the City of Austin Are Higher than the National Average

Benchmarking Communities

(over 250,000 population)

- Arlington County, VA
- Arlington, TX
- Austin, TX
- Dallas, TX
- Denver, CO
- Des Moines, IA
- Detroit, MI
- Durham, NC
- Fort Lauderdale, FL
- Fort Worth, TX
- Houston, TX
- Indianapolis, IN
- Johnson County, KS
- Mansas City, MO

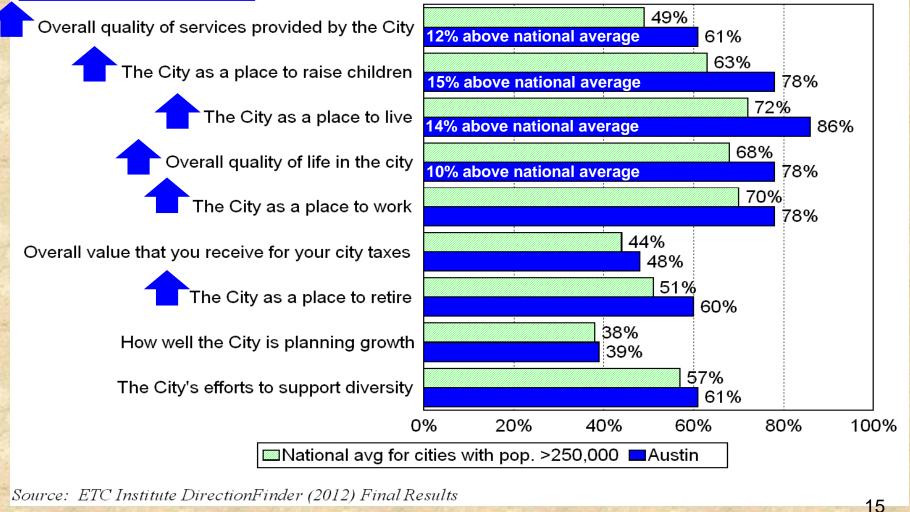
- Miami-Dade County, FL
- Minneapolis, MN
- Oklahoma City, OK
- Providence, RI
- San Antonio, TX
- San Bernardino County, CA
- San Diego, CA
- Seattle, WA
- St. Louis, MO
- Tempe, AZ
- Tulsa, OK
- Tucson, AZ
- Wichita, KS
- Yuma County, AZ

Perceptions of the City

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons

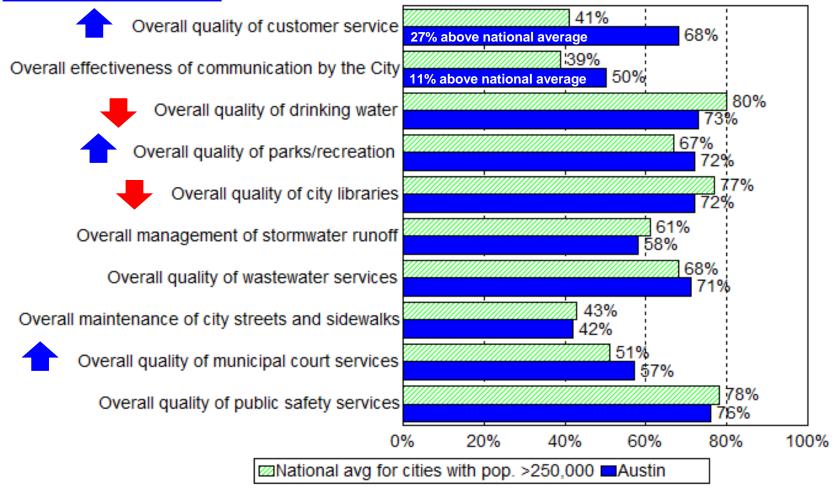


Satisfaction with Major Categories of City Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons



Source: ETC Institute DirectionFinder (2012) Final Results



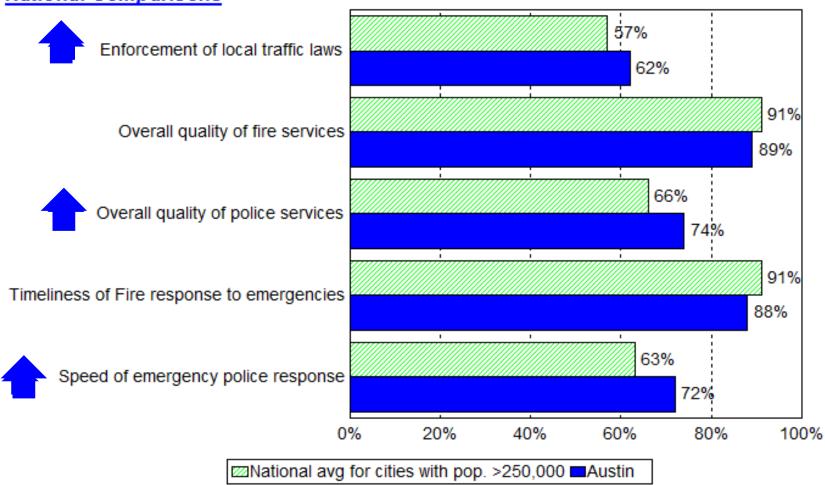
16

Satisfaction with Public Safety Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons

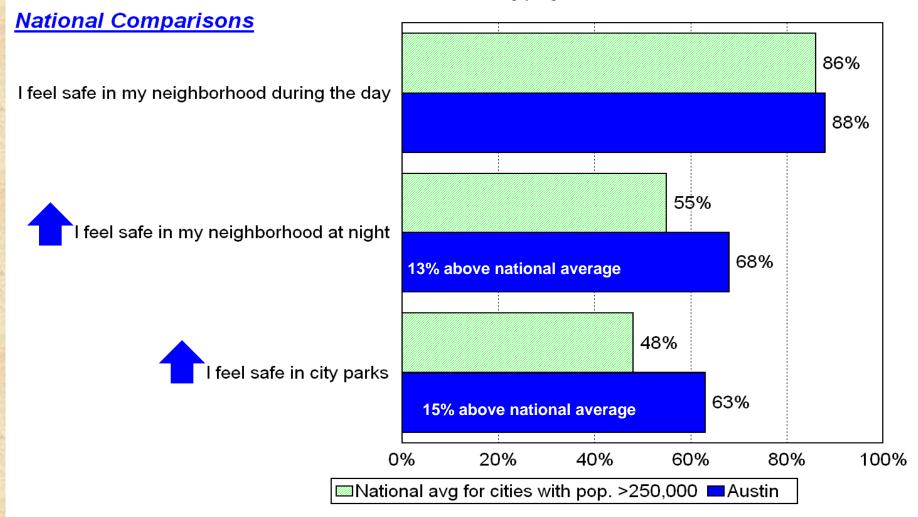




Feeling of Safety in the City

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "strongly agree"

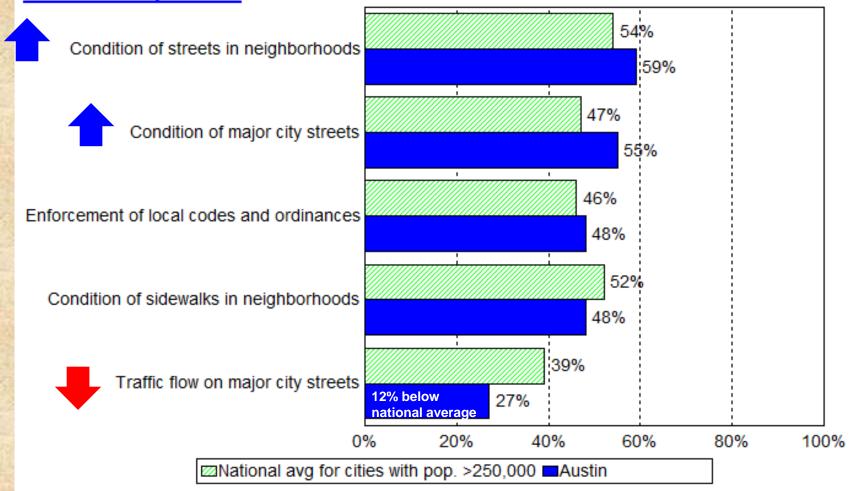


Satisfaction with Maintenance Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons



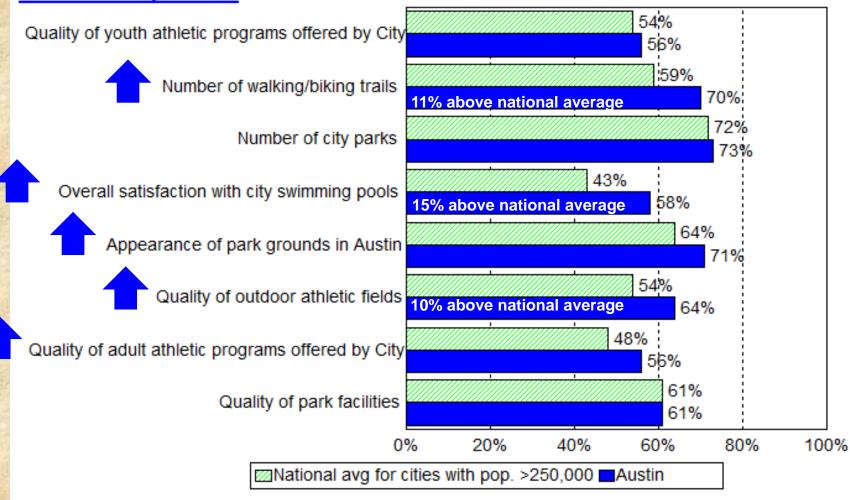


Satisfaction with Parks and Recreation Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons



Significantly Higher:

Source: ETC Institute DirectionFinder (2012) Final Results

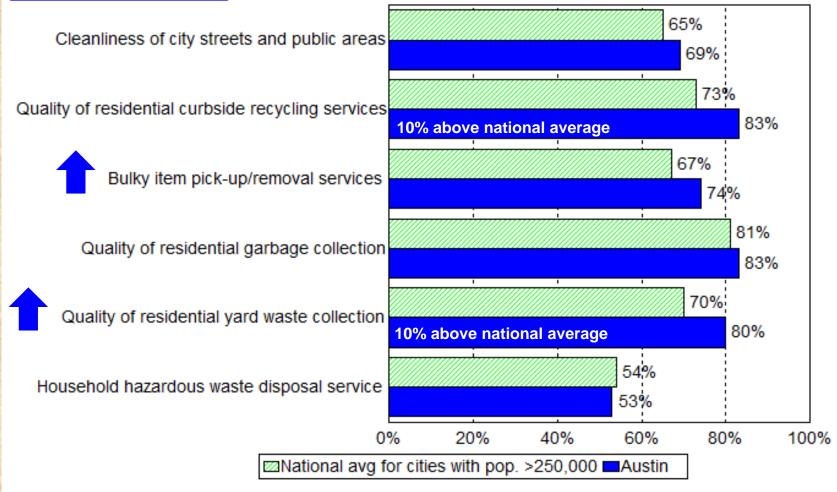
Significantly Lower:

Satisfaction with Neighborhood Services

Austin vs. Large U.S. Cities

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

National Comparisons



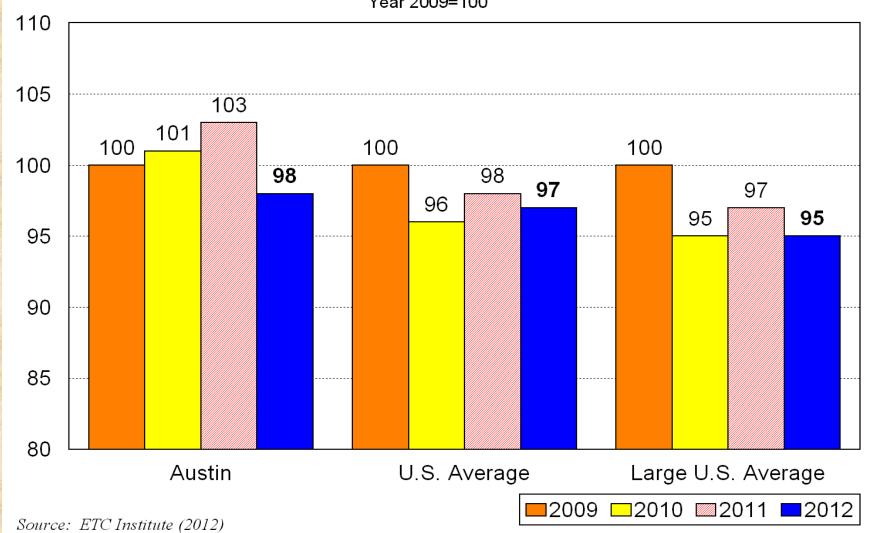


Major Findings: #4

Although Austin is Still Setting the Standard for Service Delivery, Satisfaction with City Services Decreased Slightly This Year

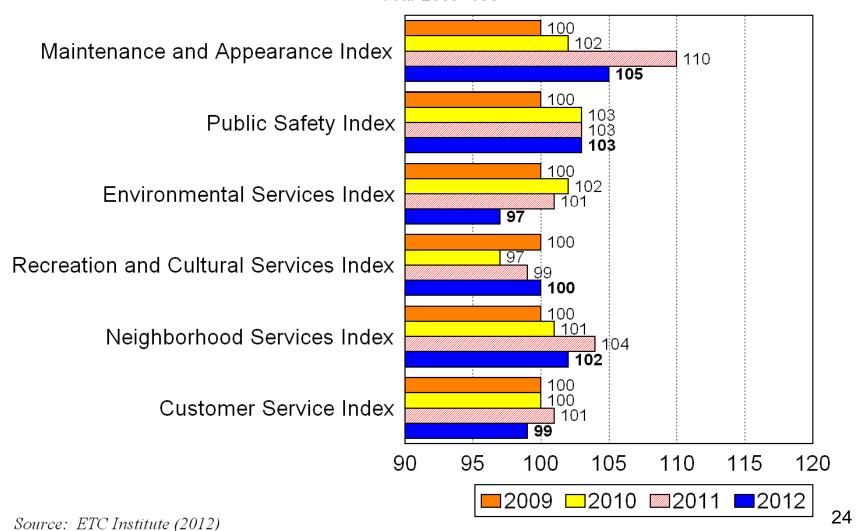
Overall Composite Customer Satisfaction Index 2009 vs. 2010 vs. 2011 vs. 2012

derived from the mean positive ratings provided by residents Year 2009=100



Composite Customer Satisfaction Index by Department/Area: 2009 vs. 2010 vs. 2011 vs. 2012

derived from the mean positive ratings provided by residents Year 2009=100



Notable Increases in Satisfaction From 2011

☐ Quality of outdoor athletic fields (+6%)
☐ Quality of adult athletic programs (+4%)
☐ Library programs (+3%)
☐ Accessibility of municipal court services (+3%)
☐ Enforcement of local codes and ordinances (+2%)
☐ Cleanliness of library facilities (+2%)
☐ Appearance of park grounds in Austin (+2%)
☐ Number of walking/biking trails (+2%)

☐ Quality of youth athletic programs (+2%)

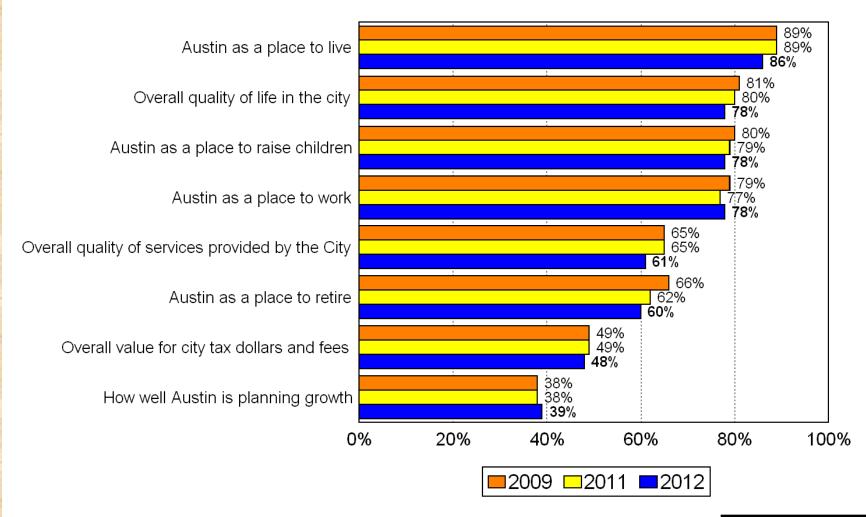
Notable Decreases in Satisfaction From 2011

□ Quality of electric services (-8%)
□ Condition of streets in your neighborhood (-7%)
□ Food Safety Inspection Program (-6%)
□ Condition of sidewalks in your neighborhood (-6%)
□ Overall maintenance of City streets and sidewalks (-6%)
□ Availability of affordable housing (-5%)
□ Animal Services (-5%)

☐ Quality of drinking water services (-5%)

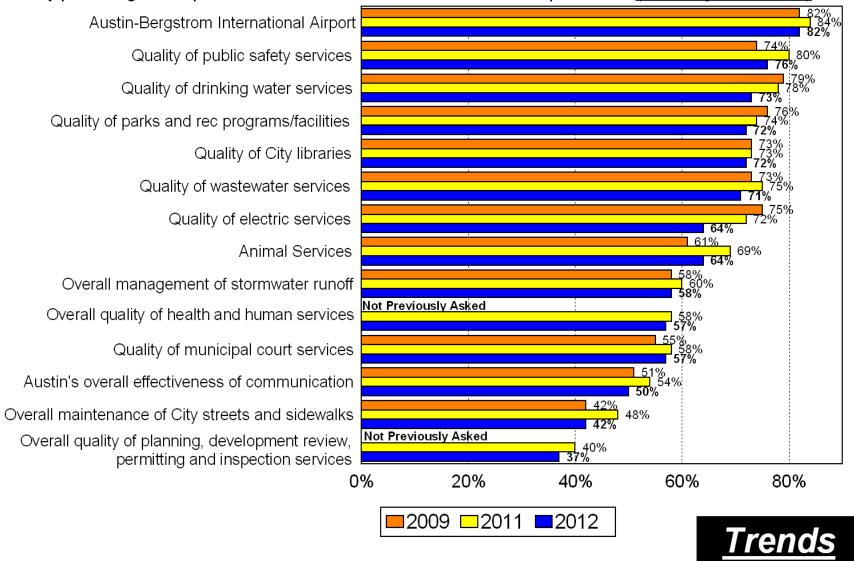
26

Overall Perception Residents Have of the City - 2009, 2011 and 2012



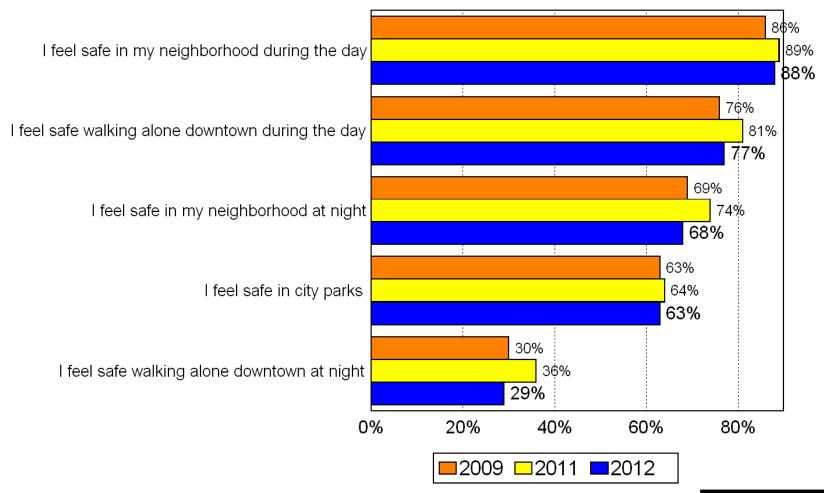


Overall Satisfaction With Various Aspects of City Services by Major Category - 2009, 2011 and 2012



Perceptions of Public Safety and Security - 2009, 2011 and 2012

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

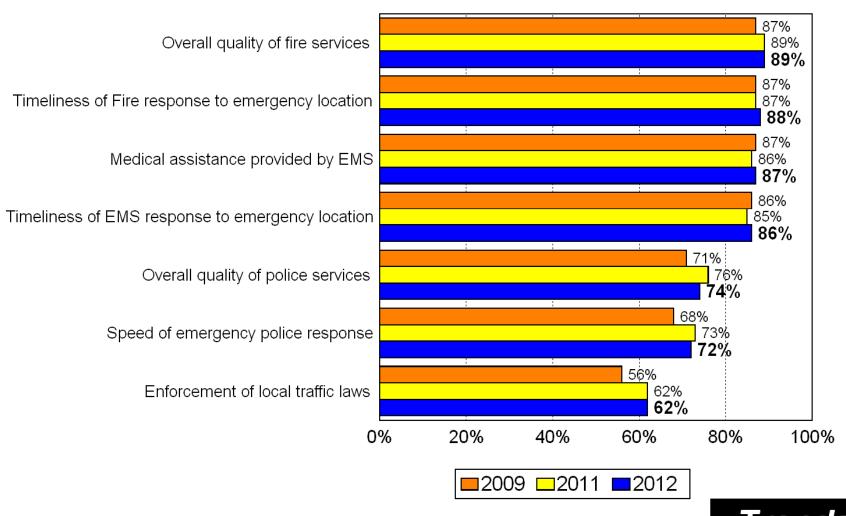


Source: ETC Institute DirectionFinder (2012 - Austin, TX)

<u>Trends</u>

Satisfaction With Various Aspects of Public Safety by Major Category - 2009, 2011 and 2012

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

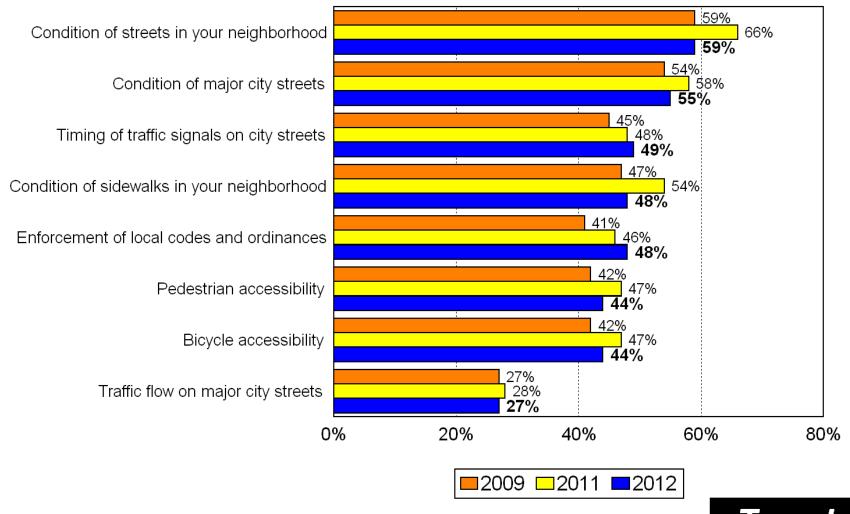


Source: ETC Institute DirectionFinder (2012 - Austin, TX)

Trends

Satisfaction With Various Aspects of Maintenance and Appearance by Major Category - 2009, 2011 and 2012

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

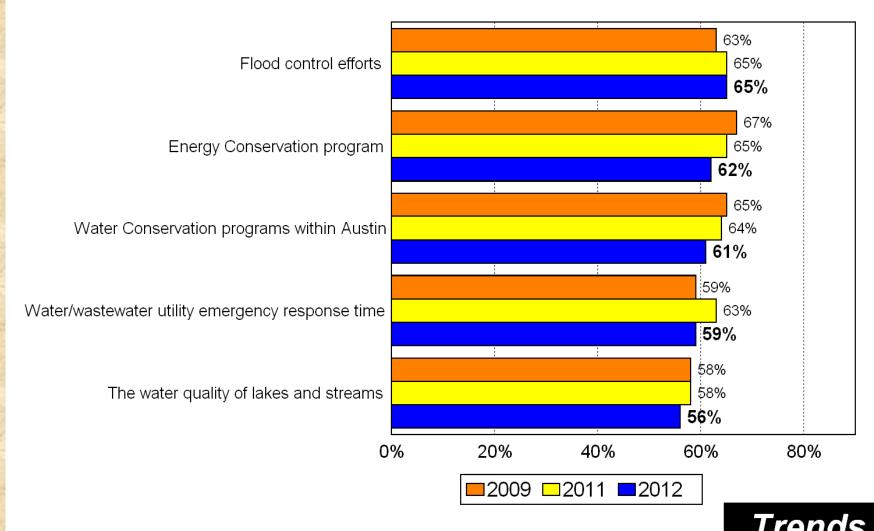


Source: ETC Institute DirectionFinder (2012 - Austin, TX)

<u>Trends</u>

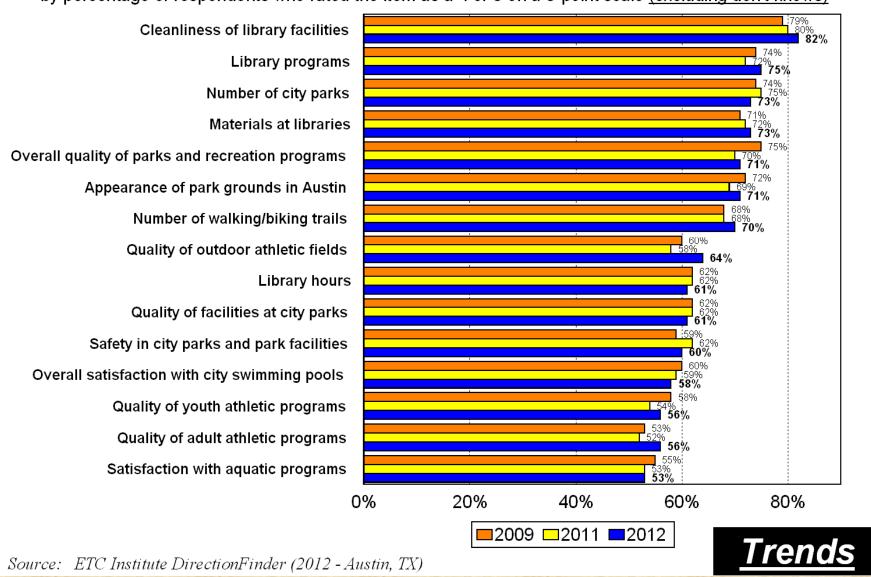
Satisfaction With Various Aspects of Environmental Services by Major Category - 2009, 2011 and 2012

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale (excluding don't knows)

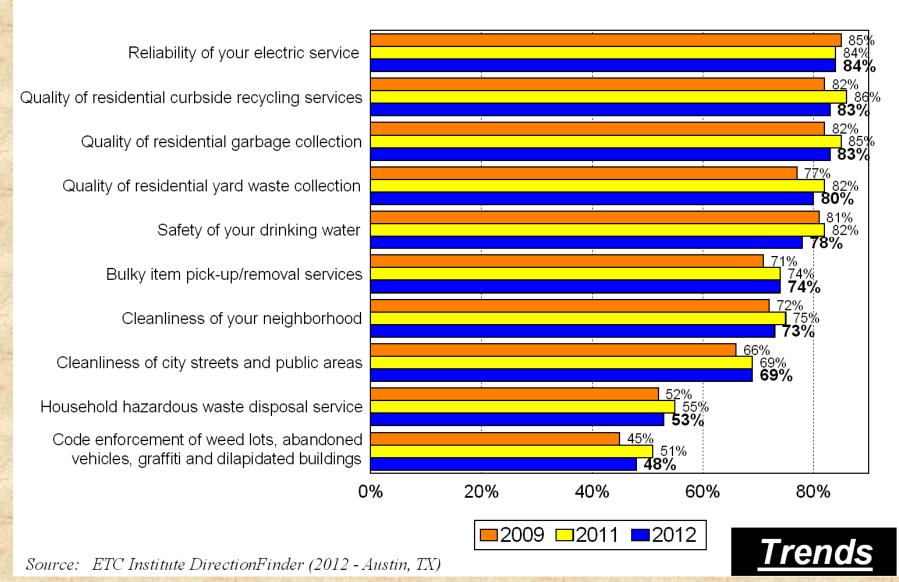


Source: ETC Institute DirectionFinder (2012 - Austin, TX)

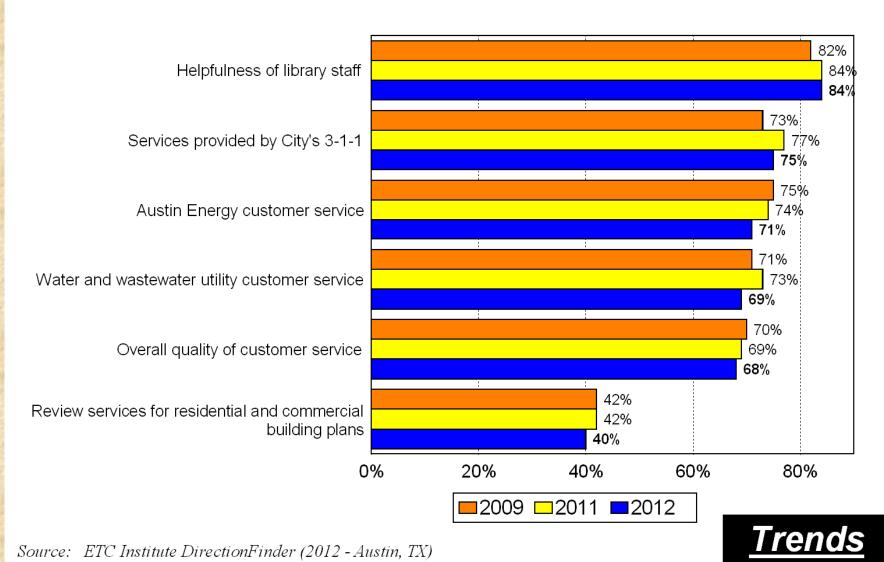
Satisfaction With Various Aspects of Recreation and Cultural Services by Major Category - 2009, 2011 and 2012



Satisfaction With Various Aspects of Residential and Neighborhood Services by Major Category - 2009, 2011 and 2012



Satisfaction With Various Aspects of Customer Service by Major Category - 2009, 2011 and 2012



Major Finding #5

Priorities for Investment

Importance-Satisfaction Rating						
Austin, TX						
OVERALL						
Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance- Satisfaction Rating	I-S Rating Rank
High Priority (IS .1020)						
Overall maintenance of City streets and sidewalks	29%	3	42%	13	0.1691	1
Quality of public safety services	54%	1	76%	2	0.1301	2
Quality of drinking water services	38%	2	73%	3	0.1000	3
Medium Priority (IS <.10)						
Quality of electric utility services	26%	4	64%	8	0.0922	4
Overall quality of health and human services provided by City	21%	6	57%	11	0.0916	5
Overall quality of planning, development review, permitting and inspection services	14%	7	37%	14	0.0873	6
Quality of parks and rec programs/facilities	22%	5	72%	5	0.0606	7
Austin's overall effectiveness of communication	8%	11	50%	12	0.0375	8
Quality of City libraries	12%	8	72%	4	0.0325	9
Animal Services	8%	10	64%	7	0.0271	10
Quality of wastewater services	8%	9	71%	6	0.0238	11
Quality of municipal court services	5%	13	57%	10	0.0206	12
Overall management of stormwater runoff	4%	14	58%	9	0.0176	13
Austin-Bergstrom International Airport	6%	12	82%	1	0.0099	14

2012 City of Austin DirectionFinder Importance-Satisfaction Assessment Matrix

-Overall-

(points on the graph show deviations from the mean importance and satisfaction ratings given by respondents to the survey)

mean importance

Exceeded Expectations Continued Emphasis lower importance/higher satisfaction higher importance/higher satisfaction Austin-Bergstrom . **International Airport** Quality of public safety services. Satisfaction Rating **Quality of City libraries** Drinking water services Quality of parks and Quality of wastewater services. recreation programs/facilities Animal Services • Quality of electric services Overall management of stormwater runoff Overall quality of health and human Municipal services provided by the City court services Effectiveness of City communication • Quality of planning, development review, Overall maintenance of City streets and sidewalks permitting and inspection processes Less Important Opportunities for Improvement higher importance/lower satisfaction lower importance/lower satisfaction

Source: ETC Institute (2012)

Lower Importance

Importance Rating

Higher Importance

mean satisfaction

How Funding for City Services Should Change

Q19. How Residents Think the Level of Service for Various City Programs and Services Should Change

by percentage of respondents who rated the item on a 5-point scale where a rating of 5 means the level of service "should be much higher" and a rating of 1 means the level of service "should be much lower" (excluding don't knows); the 2012 budgeted amount is also provided for reference.

Police Patrol/Neighborhood Policing (\$132M)	18%	33%)	43%		7%					
Social Services Programs (\$25M)	21%	30%	1/0	35%		15%					
Park and Park Facility Maintenance (\$15M)	15%	34%		47%		5%					
Affordable Housing/Community Development (\$17M)	20%	28%		36%		16%					
Library Services (\$20M)	17%	29%		44%		10%					
Police Investigations (\$43M)	16%	29%		48%		7%					
Pools and Aquatic Programs (\$5M)	15%	28%		49%		7%					
Disease Prevention/Community Health Programs (\$24M	16%	28%		49%		8%					
Emergency Dispatch Services (911) (\$20M)	13%	29%		56%		3%					
Recreation Centers and Programs (\$15M)	13%	29%		50%		8%					
Emergency Medical Services Response (\$35M)	13%	27%	58%			3%					
Museums and Arts Center Services (\$5M)	13%	27%		50%		11%					
Fire/Emergency Response (\$106M)	13%	27%		57%		4%					
Animal Shelter and Services (\$8M)	14%	25%		48%		13%					
Fire Emergency Prevention (\$4M)	13%	26%	57%			5%					
Restaurant Inspections (\$4M)	13%	25%	57%			6%					
Traffic Enforcement (\$17M)	14%	22%	51%			13%					
Neighborhood Planning and Zoning (\$4M)	11%	23%	54%		54%						
Public Safety Professional Standards/Training (\$27	13%	20%	55%			12%					
Code Compliance (\$7M)	11%	21%	54%			14%					
One Stop Shop for Development Services (\$20M)	7% ////18	3%	57%		20		57%			18%	
Municipal Court Services (\$11M)	7% ///16	65%				12%					
0) %	20%	40%	60%	80%	100)%				
Much Higher (4)											

Source: 2012 ETC Institute

Summary and Conclusions

- Residents Generally Have a Positive Perception of the City
- The City of Austin Continues to Set the Standard for Other Large Cities
- Improvements to City <u>Streets/Sidewalks</u>, <u>Public Safety</u> and <u>Drinking Water Services</u> will have the most positive impact on overall satisfaction over the next year.

Questions?

THANK YOU